Monthly BST Lead Meeting
November 14, 2006
10 am – 11 am

ATTENDEES

Phyllis Creech, Agriculture	John Stephenson, Agric.	Rose Hendricks, Commerce
Marvin Mervin, AOC	Mickeal Johnson, DCR	Chet Mottershead, Commerce
Wayne Holliday, DOC	Rod Davis, DENR	Deborah Barnes, DHHS
Deanna Perry, DHHS	Jodi Bone, ESC	Jim Newman, DOI
Kathy Gruer, DHHS	Trisch Amend, NCHFA	Cassandra Watford, DJJDP
Debra Lassiter, ITS	Elsie Underhill, OAH	Robin Diehl, NC EdLottery
Julie Batchelor, OSC	Becky Brown, Labor	Randy Keel, DOT
Ursula Hairston, OSBM/Gov.	Van Lindley, Revenue	Alan Sanders, DOJ
Van Lindley, DOR	Carol Batker, Wildlife	Rhonda Langston, Treasurer
Tami Luckwaldt, DOI	Cora Bright, DOT	Lowell Magee, BEACON
Don Branthwaite, DOT	John Atta-Nyamekye, DOT	Edward Brodsky, BEACON
Valerie Ford, DOA/Lt. Gov.	Randy Smith, Wildlife	Tom Legare, BEACON
Larry McLamb, DPI	Jeannie Betts, DENR	Tyler Jones, BEACON
Earlene Hicks, SHP	Jim Knight, NC EdLottery	Libby Williams, BEACON
Chris Loso, BEACON	Jill Denning, BEACON	Shirley Patterson, BEACON

AGENDA ITEMS

Project Update – Lowell Magee

- We are concluding activities for Blueprint Phase; deadline is December 22. Currently on target.
- The rollout schedule was finalized at the end of October.
  - The Department of Revenue was moved to the Jan. 2008 rollout due to the busy tax season that starts in April. Adds approximately 1,700 employees.
  - Group 1 will include approximately 38,321 employees and 971 core users; Group 2 will include approximately 43,595 employees and 843 core users.

Leadership Action Plan – Tom Legare

- Definition: Change leadership involves setting direction, demonstrating personal resolve for change and influencing others to give their support and commitment.
- Purpose: Structured approach to leadership coaching
  - Clarifies leadership role requirements
  - Identifies and leverages personal strengths on behalf of the project
  - Results in one-on-one action planning contracts

- Robert Powell and Gwen Canady will be meeting with agency secretaries before year, providing them with a memo outlining key dates and means of support that can be sent to their employees. Other key memos will be made available throughout the next year as well. Such messages include the following:
    - January 2007 – Commitment to BEACON HR/Payroll Project
    - April 2007 – Benefits of BEACON HR/Payroll system
    - July 2007 – BEACON HR/Payroll system testing
    - September 2007 – BEACON HR/Payroll system training
    - December 2007 – Final preparation for BEACON HR/Payroll system go-live

Training Strategy Update – Shirley Patterson

- Shirley Patterson joined the state as the BEACON HR/Payroll Project training lead in October; Bob Fritz also joined the team as a resource from BearingPoint.
- The team is creating a high-level strategy due to be completed by mid-December – they are conducting an assessment and collecting data. Key activities include the following:
    - Meet with key users and agency leads
    - Analyze SAP transaction data
    - Conduct end-user survey
    - Review existing training materials
    - Interview IT management
    - HR data – employee and job information
    - Lessons learned from other state ERP projects
- If anyone needs to change their training agent, please contact Shirley Patterson at Shirley.Patterson@ncosc.net.

Change/Workforce Transition Agents Update – Libby Williams

- The Change/Workforce Transition (WFT) Agents kickoff meeting will take place on December 6. Two sessions will be held: from 8:30 to 11 a.m. and 1:30 to 4:00 p.m.
- Please submit any changes in your Change/WFT Agents immediately so the correct people can be invited to the meeting. Send changes to Libby Williams at Libby.Williams@ncosc.net.

Updates from the Field – Edward Brodsky

Jim Newman from DOI and **Alan Sanders** from DOJ highlighted their activities related to the BEACON HR/Payroll Project thus far.

Jim Newman, DOI

- Including information about the BEACON HR/Payroll Project in their bi-monthly newsletter
- Met with all 23 division heads and discuss the BEACON HR/Payroll Project activities
- Briefed executive staff twice in last four months
- Specific questions from staff are asked and answered in the Q&A section of the BST Lead meeting minutes

Alan Sanders, DOJ

- Meeting with SMEs and BST representatives in agency for 15-minute “stand up” sessions
- Included 5-10 minute BEACON HR/Payroll Project update in HR staff meetings
- Senior management team included 15-minute BEACON HR/Payroll Project update
- Included BEACON HR/Payroll Project materials from website in agency newsletter that goes out monthly to 1,300 employees.
- Placed brochures on bulletin boards
- DOJ staff is eager for specifics about project; they understand the overview of the system. They now want to see what the BEACON HR/Payroll system will look like.
- If anyone would like to volunteer to share their activities in future meetings, contact Edward Brodsky at Edward.Brodsky@ncosc.net.

Upcoming Project Activities – Edward Brodsky

- What is needed from BST Team Leads:
    - Communicate project information to agencies
    - Examine BST Scorecard information on BEACON HR/Payroll Project website to determine areas that need to be addressed

- What you can expect from the BEACON HR/Payroll Project Team:
    - Update website on weekly basis
    - Facilitate on-boarding workshop for the Change/WFT Agents
    - Conduct training assessment
    - Present high level project plan and agency resource overview

Upcoming BST Lead Meetings

- Please review the following revised BST Lead meeting dates. Pleas update your calendars – these are new dates:
    - Tuesday, December 12 (10-11 am)
    - Tuesday, January 30, 2007 (10-11 am)
    - Tuesday, February 27, 2007 (10-11 am)
    - Tuesday, March 27, 2007 (10-11 am)
    - Tuesday, April 24, 2007 (10-11 am)

BEACON HR/Payroll Project Change/Communications Team Contacts

- Change/Communications Lead = Edward Brodsky – edward.brodsky@ncosc.net, 919-431-6520
- Communications Lead = Tyler Jones – tyler.jones@ncosc.net, 919-431-6523
- Change/WFT Lead = Libby Williams – libby.williams@ncosc.net, 919-431-6623
- Training Lead = Shirley Patterson – shirley.patterson@ncosc.net, 919-431-6626

BST LEAD QUESTIONS AND ANSWERS

Has the BEACON HR/Payroll Team ensured that agencies have committed the proper resources to assist with the project before new system benefits are marketed to state employees?
The BEACON HR/Payroll Project Team is currently meeting with agency leadership to ensure they are aware of the resources they need to commit to the project to help them with transition over to the new system. We plan to meet with the larger agencies before the end of the year and will meet with the smaller agencies soon thereafter.

Will training be available to new employees after go-live?
Yes. We are including ongoing training for new employees in our training plans.

How will the BEACON HR/Payroll system interact with the ORBIT retirement system?
The BEACON HR/Payroll Project Team is currently working with the ORBIT retirement system project team to ensure employees can have a single state identifier (ID). However, the BEACON HR/Payroll system will not be integrated with the ORBIT retirement system.

Will the recruiting and training & events modules ever be available, since they are not in scope for the January/April 2008 rollout?
The funding for a training & events and recruiting modules has been requested as part of the expansion budget submitted this week. If approved, they would become part of a separate project and would be completed at a later date.

Will we be able to use the old systems when we go live? We use the recruiting module in PMIS, and since it will not be available when the rest of the system goes live, we are concerned about accessing it.
There will be no dual systems running once an agency goes live with the new system. This applies to duplicate functions such as payroll. However, there will be access to “old systems” for functions such as recruiting which are out of scope for the new system.

Our IT employees are concerned about equipment and security needs; what can we tell them?
The BEACON HR/Payroll Project Team will be working with the IT personnel within each agency to ensure they have the needed checklist of activities and assistance needed to address any cutover activities associated with go-live to the new system.

We have not received answers yet to many of our parking lot items from the wave 2 design sessions. When can we expect answers?
We should have all of the information documented soon. Once finalized, we will be sharing this information with all of the agencies. If you have specific items that you feel still need to be addressed, please contact the appropriate functional teams with your questions or concerns. The appropriate functional team will meet with you to discuss your considerations.

Will the BEACON HR/Payroll system accommodate supplemental benefits?

Yes. However, there will be a difference between how additional benefits offered by the agencies will appear in contrast to benefits offered to all employees through the state health plan. Additional benefits will be treated as deductions.

I realized that I should have attended more of the Wave 2 design sessions. Can we have a make-up session or meet with members of the functional team to review the design session materials?

If you want to ensure that the functional team is aware of your thought and concerns, please contact the functional team via their designated email address.